



# **COMMITTEE ORIENTATION AND REFERENCE GUIDE**

A guide for committee chairs and committee members  
of the West Newbury PTO

## Welcome to the Team!

Thank you for volunteering to lead or serve on one of our committees. The information in this guide is intended to help you to get started in your role. We hope you find this guide helpful as you prepare to build your team or aid you in making your contribution right away. The guide is divided into the following sections:

- I. Role of the Committee Chair(s)
  - Overview
  - The Initial Step
  - Ongoing Communication
  - The Home Stretch
  - End of Year
- II. Role of a Committee Member
- III. West Newbury PTO Basics
  - The Where? and What?
  - Channel of Communication
  - Executive Committee Meetings
  - General PTO Meetings
  - Committee Reports
- IV. Event Procedures
  - Reserving Space
  - Room Setup
  - Recruiting & Retaining Volunteers
  - Event Promotion
    - Communications
    - Advertising
  - Money Matters
    - Reimbursements
    - Cash Box
  - PTO Closet Access

If you learn things during your tenure that you feel would be helpful to include in this guide, or if you need assistance at any time, please share your comments and suggestions with any or all of us.

Warm regards,

The West Newbury PTO Executive Board

## I. Role of the Committee Chair(s)

### OVERVIEW

The primary responsibilities of the committee chair(s) include:

- Review the PTO bylaws to gain a basic understanding of the PTO as an association
- Create and maintain a list of committee member information, such as: name, phone, address, and email
- Appoint a member of the committee to keep records of expenditures. Original receipts must be submitted to the PTO treasurer
- Arrange and facilitate meetings with your committee as needed
- Prepare and submit a monthly committee report for each General meeting
- Promote balance within your team (i.e., make sure everyone feels they have been given an opportunity to participate)
- Attend the monthly General PTO meeting or designate a member to attend and keep fellow committee members apprised of discussions at the general meetings
- If needed, represent your committee at an Executive Board meeting or designate a member to attend.

### THE INITIAL STEP

Contact each committee member and introduce yourself. Host an initial meet and greet to promote building a solid team.

### ONGOING COMMUNICATION

Maintain good communication with all members of your committee. Check in often and set regular meetings when planning an event, program or activity. Encourage team members to participate in discussions and share their ideas. Give committee members the opportunity to assume a role which fits their desires and talents.

### THE HOME STRETCH

After an event/activity, conduct a meeting to debrief. Note aspects of the event/activity that went well, and things which could be done differently next time based on each committee member's prospective.

### END OF YEAR

Prepare the following items for the next chairperson:

- A committee member contact list
- Electronic or paper copies of flyers, announcements, signs, invoices, contracts, etc.
- Notes on projects recently completed and/or under development or notes from meetings.
- List of relevant contacts outside the committee
- A completed **End-of-Year Summary** form downloadable from the PTO web site at <http://www.wnpto.org/forms/>.

Committee files should be returned to the PTO Executive Board in May or June, or as soon as your role as chairperson has concluded. If the files are kept on a Google Drive, they should be shared with the Executive Board members. If you plan to continue as chair, you may maintain the committee's files. Each Committee Chair must complete an **End-of-Year Summary** Form at the end of every school year, even if remaining for another term.

## II. Role of a Committee Member

Committee members should take an active role by attending and participating in committee meetings and team discussions. Ask detailed questions if something is unclear. Only make realistic time commitments that suit your schedule and honor the commitments you make. When in group discussions, be thoughtful, open-minded and value differences of opinion.

Committee members should gain an understanding of the PTO bylaws as well as the "PTO Basics" and "Event Procedures" sections of this guide.

## III. PTA Basics

### THE WHERE? & WHAT?

- The PTO Executive Board email address is [wnptoexecboard@wnpto.org](mailto:wnptoexecboard@wnpto.org)
- The PTO has a mailbox near the door in the main office.
- The PTO has a room for storage in the school. The room is referred to as the PTO Closet. Keys for the room are in the PTO mailbox.

### CHANNEL OF COMMUNICATION

Issues or concerns within a committee regarding disagreements or misunderstanding of school procedures or policy should be brought to the Executive Board for resolution. A member of the Executive Board will address the issue with school administration.

## EXECUTIVE BOARD MEETINGS

The Executive Board meets once per month. **Committee chairs are encouraged to join the meeting if there are concerns to address.** If a committee chair is not available to attend, a member designated by the chair is welcome to attend on behalf of their committee.

## GENERAL MEETINGS (HELD MONTHLY)

General meetings are held on Monday's of each month (Sept-May) at 7:00 p.m. in the Page school library. The presence of all committee members at monthly PTO meetings is not necessary. However, it is beneficial for one member from each committee to attend because fellow PTO members or members of the school community may have questions about your committee or event. In this case, it is best for a member of that committee to answer the questions directly. It is also a great way to recruit potential committee members.

Collaboration and brainstorming should occur within your individual committee meetings. The monthly general meeting is not a forum for specific discussion of committee business and issues. If there is difficulty reaching a consensus or there are issues needing outside assistance, please contact a member of the Executive Board.

## COMMITTEE REPORTS

Each committee chair must submit a Committee Report each month. Reports are due **no later than 5:00 p.m.** on the Monday before the monthly meeting to ensure reports can be distributed electronically to members in advance of the meeting. Send reports to [wnptoexecboard@wnpto.org](mailto:wnptoexecboard@wnpto.org). In order to continue compliance with the PTO bylaws, committees must submit reports even when there has been no activity for that month. Simply send a report stating, "no activity."

## IV. Event Procedures

### RESERVING SPACE

- Provide the PTO Executive Board potential events dates to be a discussed and approved by the school principal to minimize conflicts with school activities.
- Once dates have been approved by the principal, complete a **Facilities Use Form** and deliver to the Central Office. The Facilities Use Form can be obtained from the Page school secretary or downloaded from the district web site at <http://www.prsd.org/>.
- Inform the Page school secretary of the event date. (Central Office will also email the event owner a confirmation). **If you do not receive an email confirmation, please contact the Page school secretary to ensure it is posted on the district calendaring system.**

## ROOM SETUP

- A **Room Setup Form** needs to be completed and returned to the Page secretary two weeks prior to an event at the Page School. Copies of this form can be obtained from the Page school secretary.

## RECRUITING & RETAINING VOLUNTEERS

When a flyer, email or other communication is distributed for a “call for volunteers,” please remember to track the names of willing volunteers and send a note of thanks after the event.

## EVENT PROMOTION

### Communications

All PTO correspondence for school wide distribution needs to be submitted to the Executive Board no later than **Wednesday at noon** to ensure distribution in the following Monday’s weekly communicator.

#### Creating a Flyer

At least three weeks prior to the event or activity, draft a flyer which contains the basic information about your event. In addition, the PTO logo must be on the flyer.

Completed flyers must be sent electronically to the PTO Executive Board for review. The flyer will be forwarded to the School Principal for approval. You will be notified when the flyer has been approved and is ready for you to copy.

#### Copying a flyer

Before copying a flyer, make sure you have obtained approval.

There is a sheet on the wall near the copier that states how many students are in each class. The PTO is permitted to use the copy machine(s) in the former creation space ONLY. There are two copy machines. The one on the right is the fastest for making multiple copies of one sheet of paper.

***NOTE: Teacher’s use of the room takes priority. Therefore, if a teacher is using the machine(s), or arrives while you are copying, please let the teacher cut in and resume copying once he/she has finished.***

### Distributing a flyer

Most times, the school secretary is very willing to put flyers into the teachers' mailboxes. However, if she is busy or unavailable, you will need to distribute the flyer. Items should be in the teachers' mailboxes by 10:30 a.m. on Thursday for that week's Friday Folders.

### Distributing email correspondence

**School List Serve** --- Send your completed, spell checked message to the PTA president for review. The President will forward your request to the Principal for approval and distribution via the school list serve.

**PTO email list** --- Send your completed, spell checked message to the PTO Executive Board for review. The Executive Board will forward your request to the PTO Email Communications person for distribution via PTO email blast. In most cases, items will be included in the weekly Communicator. Because the Communicator is released weekly, it is important that all requests are received by the Executive Board by the previous Wednesday. Occasionally, a need will arise where an email blast needs to go out earlier. These instances will be decided on by the Executive Board.

## **Advertising**

You are encouraged to take advantage of the PTO's mechanisms for advertising and/or showing appreciation for volunteers you relied on.

**Front Hallway Bulletin Board:** If you would like something to appear on the front hallway bulletin board, please send an email to [wnptoexecboard@wnpto.org](mailto:wnptoexecboard@wnpto.org).

**PTO Communicator:** If you would like a spot in the PTO Communicator, please email your write-up to the PTO Executive Board. The PTO Communicator is sent electronically every Monday morning.

**The One Page:** If you would like information posted in The One Page for your event or committee, send an email to the Principal [dgray@prsd.org](mailto:dgray@prsd.org).

## **MONEY MATTERS**

### **Vendor Contracts**

Contracts can be signed by the Treasurer or an Executive Board Member and should be emailed at least one week before the contract needs to be signed. Signed contracts will be returned to the PTO mail box in the main office or returned to you in person if possible. It is your responsibility to pick up your signed contract.

### **Funding Requests**

Requests for funds for purchasing supplies for events, activities and programs should be emailed to the Treasurer or Executive Board **prior to making the purchase** so the Executive Board can discuss and approve.

### **Check Requests for Vendors**

Request for payments to vendors must be submitted to the Treasurer at least **one week** in advance of your committee needing the payment. Please email the Treasurer with appropriate information to process the check.

### **Reimbursements**

Submit **original** receipts along with a completed reimbursement form to the Treasurer for reimbursement soon after your purchase(s) is/are made. The Treasurer has a mail box in the PTO office area or you may leave an envelope containing the original receipt or packing slip in the PTO mailbox clearly marked "for Reimbursement". Contact the Treasurer to inform that you've left a receipt for reimbursement and include whether you want the check mailed or left in the PTO mailbox for you to pick up.

### **Cash Box**

There is a cash box for use at PTO events. Contact the Treasurer to arrange for pickup and return of the cash box **ONE WEEK BEFORE YOUR EVENT/ACTIVITY**. Please count the cash before use and account for all expenses before returning the cash box. There is a self-explanatory sheet to sign to account for funds received and funds returned in the box.

### **Cash and Checks for Deposit**

Any cash or checks received from an event/program must be given to an Executive Board member or the Treasurer for deposit into the PTO bank account.

### **ACCESSING THE PTO Closet**

The PTO Closet key is in the PTO mailbox. The closet is hard to find. It is recommended to have another PTO member show you where it is the first time you go.